

**System and Method for Rule-Pen Based Conversations in  
Synchronous Collaborative Environment**

**BACKGROUND OF THE INVENTION**

**1. Technical Field**

5       The present invention relates in general to a system and method for rule-pen based conversations in a synchronous collaborative environment. More particularly, the present invention relates to a system and method for a participant in a collaborative discussion to intuitively  
10 engage in conversations with other participants based upon rule criteria.

**2. Description of the Related Art**

      With the onset of advanced technology, online collaboration has become increasingly feasible. Online  
15 collaboration systems support groups of people that are engaged in a common task (or goal) by providing an interface to a shared environment. For example, users may use a distributed presentation tool on each of their client computers, such as Lotus e-Meeting or Windows NetMeeting,  
20 in order for the users to collaborate on a particular topic. As businesses become more global, and as businesses cut expenses, online collaboration has become a popular mechanism for users who are located at different geographic locations to participate in a meeting.

25       Participants of an online collaboration session are people with different skill sets, different time zones, and whose willingness to help other participants varies. A challenge found with existing art is that if, during a

presentation, a first participant wishes to discuss a particular aspect of the presentation, the first participant is challenged in identifying other participants from which to receive assistance. The first participant  
5 may not know the other participants' skill sets and, therefore, the first participant's option to receive assistance is to disrupt the presentation by interrupting the presenter. For example, a participant may have a question regarding a portion of a presentation that  
10 corresponds to Java bean creation. In this example, the participant may not know which other participants are qualified to answer his question regarding Java bean creation.

A user may explicitly invoke a collaborative session  
15 with various participants. However, a challenge found with this approach is that the user is not able to intuitively reference portions of the presentation, such as figures and diagrams. In addition, a user may find it difficult to manage multiple conversations (i.e. collaborative  
20 sessions), and also may not being interested in each conversation that is occurring.

What is needed, therefore, is a system and method for a participant to intuitively collaborate with other participants based upon the other participants' particular  
25 information, such as their skill sets.

**SUMMARY**

It has been discovered that the aforementioned challenges are resolved by using a rule pen to identify discussion participants that meet particular criteria, and  
5 send a message to the identified discussion participants that includes a rule and a comment. A discussion participant selects a rule pen that includes an associated rule. The discussion participant's client includes the rule and a comment in a message, and sends the message to a  
10 server. The server identifies other participants that meet the rule criteria, and forwards the message to the identified participants. Upon receipt, the identified participants may respond to the message. In addition, the identified participants may export the rule, modify the  
15 rule, and associate the modified rule to a new rule pen for use with subsequent messages.

A server supports a collaborative discussion, such as a distributed presentation, between a plurality of clients. For example, users may use a distributed presentation tool  
20 on each of their clients, such as Lotus e-Meeting or Windows NetMeeting, in order for the users to collaborate on a particular topic.

A first user initiates the discussion and has his client send session content to the server through a  
25 computer network, such as the Internet. The server identifies users that are participating in the distributed presentation, and sends the session content to the users' clients. For example, a company's division may be participating in a distributed presentation whereby users

that correspond to each of the clients belong to the division.

A second user reviews the session content and has a comment, such as a question, regarding the session content.

5 For example, the second user may have a particular question regarding EJB (Enterprise Java Bean) technology and does not know which other participant to ask the question. The second user creates a rule pen, associates a rule to the rule pen, and includes one or more rule sentences to

10 correspond with the rule. A rule sentence may be atomic or complex, and may include terms, constants, connectives and functions. The second user's client includes the rule and the comment in a message, and sends the message to the server through the computer network.

15 The server receives the message and extracts the rule from the message. The server parses the rule and uses a look-up table to identify participants implied in the rule. In one embodiment, the server may access an online company directory to identify discussion participants that

20 correspond to the rule.

Once the server is finished identifying participants that correspond to the rule, the server sends the message to the identified participants, whereby the identified participants may respond to the message (i.e. answer a

25 question). In addition, an identified participant may export the rule, modify the rule (i.e. add, remove, or modify rule sentences) in order to create a new rule pen for use with subsequent messages. When more than one participant exports a rule pen, these participants may have

30 a conversation which is confined to the participants

identified by the rule associated with the rule pen that is used to send messages.

The foregoing is a summary and thus contains, by necessity, simplifications, generalizations, and omissions  
5 of detail; consequently, those skilled in the art will appreciate that the summary is illustrative only and is not intended to be in any way limiting. Other aspects, inventive features, and advantages of the present invention, as defined solely by the claims, will become  
10 apparent in the non-limiting detailed description set forth below.

**BRIEF DESCRIPTION OF THE DRAWINGS**

The present invention may be better understood, and its numerous objects, features, and advantages made apparent to those skilled in the art by referencing the  
5 accompanying drawings. The use of the same reference symbols in different drawings indicates similar or identical items.

**Figure 1** is a diagram showing a plurality of clients collaborating in a distributed presentation and one of the  
10 clients sending a message that includes a rule to a server;

**Figure 2A** is a user interface window showing an example of software code corresponding to creating a rule pen;

**Figure 2B** is a participant attribute table that includes a plurality of participant information entries;

15 **Figure 3** is a high level flow chart showing steps taken in a server sending a distributed presentation to a client and receiving a message from the client that includes a rule;

**Figure 4** is a flowchart showing steps taken in a  
20 client selecting a rule pen to include in a message;

**Figure 5** is a flowchart showing steps taken in a server identifying one or more participants based upon a rule;

**Figure 6** is a flowchart showing steps taken in a  
25 recipient client receiving and responding to a message; and

**Figure 7** is a block diagram of an information handling system capable of implementing the present invention.

**DETAILED DESCRIPTION**

The following is intended to provide a detailed description of an example of the invention and should not be taken to be limiting of the invention itself. Rather,  
5 any number of variations may fall within the scope of the invention which is defined in the claims following the description.

**Figure 1** is a diagram showing a plurality of clients collaborating in a distributed presentation and one of the  
10 clients sending a message that includes a rule to a server. Server **120** supports a collaborative discussion, such as a distributed presentation, between client A **100**, client B **130**, client C **140**, and client D **150**. For example, users may use a distributed presentation tool on each of the  
15 clients, such as Lotus e-Meeting or Windows NetMeeting, in order for the users to collaborate on a particular topic.

Client A **100** initiates the discussion and sends session content **105** to server **120** through computer network **110**, such as the Internet. Server **120** identifies the users  
20 that are participating in the distributed presentation, and sends session content **105** to client B **130**, client C **140**, and client D **150**. For example, a company's division may be participating in a distributed presentation whereby users that correspond to each of the clients are part of the  
25 division.

Client D **150**'s user reviews session content **105** and has a comment, such as a question, regarding session content **105**. Client D **150**'s user creates a rule pen and stores it in rule pen stand store **160** (see **Figure 4** and

corresponding text for further details regarding rule pen creation). Rule pen stand store **160** may be stored on a nonvolatile storage area, such as a computer hard drive. Client D **150**'s user then associates a rule with the rule  
5 pen and includes one or more rule sentences to correspond with the rule. A rule sentence may be atomic or complex, and may include terms, constants, connectives and functions. Client D **150** then includes the rule (e.g. rule **175**), along with a comment that is generated by client D  
10 **150**'s user (e.g. comment **180**), in message **170**. Client D **150** (e.g. the sending client) sends message **170** to server **120** through computer network **110**.

Server **120** receives message **170**, and extracts rule **175**. The server parses rule **175** and uses a table located  
15 in participant attribute table store **190** to identify participants that correspond to the rule sentences included in rule **175**. In one embodiment, server **120** may access other repositories, such as an online company directory or the Internet, in order to identify participants (see **Figure**  
20 **5** and corresponding text for further details regarding participant identification).

Once server **120** is finished identifying participants that correspond to rule **175**, server **120** sends message **170** to the identified participants. The example shown in  
25 **Figure 1** shows that server **120** sends message **170** to client B **130** and client C **140** through computer network **110**. Once a recipient client receives the message, and its user reviews the message, the user may respond to the message (see **Figure 6** and corresponding text for further details  
30 regarding message response details).



**Figure 2A** is a user interface window showing an example of software code corresponding to creating a rule pen. Window **200** includes lines **205** through **230**. Line **205** shows that rule pen "p" is targeted for recipients "r", whereby a  
5 recipient "r" has participant attributes that meet the rule sentence criteria included in lines **210** through **230**.

Line **210** is a rule sentence that includes a criterion for a recipient to have a job description of "Solution Architect." Line **220** is a rule sentence that includes a  
10 criterion for a recipient to an expertise of "Web Services." Line **230** is a rule sentence that includes a criterion for a recipient to have an additional expertise of "EJB." And, line **235** is a rule sentence that includes a criterion for a recipient to be willing to help other  
15 participants. When a server receives a message that includes the rule sentences that are shown in window **200**, the server identifies one or more participants whose job description is a solution architect, has expertise in web services and EJB, and is willing to help other participants  
20 (see **Figure 5** and corresponding text for further details regarding participant identification).

**Figure 2B** is a participant attribute table that includes a plurality of participant entries. Participant attribute table store **240** includes a plurality of  
25 participant entries, each of which corresponds to participants in a collaborative discussion. The example in **Figure 2B** shows that each participant entry includes five participant attributes which are shown in columns **245** through **265**. A server may use this information, as well as  
30 other information (i.e. participant willingness to help,

etc.) to identify participants to forward a corresponding message.

Column **245** includes a list of user names that correspond to participants involved in a collaborative discussion. Column **250** includes a list of user identifiers that correspond to the user names that are included in column **245**. Column **255** includes a list of job descriptions that correspond to the participants that are involved in the collaborative discussion. For example, line **270** shows that "user A" has a job description of "Sales." Column **260** includes a list of expertise that correspond to each collaborative discussion participant. For example, lines **280** and **290** show participant entries whose expertise are "Web Services" and "EJB." And, column **265** includes a list of email addresses that correspond to each collaborative discussion participant. In one embodiment, a server may access the participant attribute table, or a different database, to identify participants that are willing to assist other participants with questions and/or comments corresponding to a presentation.

**Figure 3** is a high level flow chart showing steps taken in a server sending a distributed presentation to a client and receiving a message from the client that includes a rule. Server processing commences at **300**, whereupon the server invokes a distributed presentation at step **305**. For example, users may use a distributed presentation tool, such as Lotus e-Meeting or Windows NetMeeting, in order for the users that are geographically separated to visually collaborate on a particular topic.

Processing receives presentation content from client A 100 at step 310. Client A 100 is the same as that shown in Figure 1 whose user may be the leader of the distributed presentation. Processing sends the presentation to clients  
5 that are part of the distributed presentation at step 315. For example, a software department may be participating in the distributed presentation which is discussing projects for the upcoming quarter.

Client processing commences at 355, whereupon the  
10 client receives the presentation content at step 360. Using the example described above, the client's user may be in the software department that is participating in the distributed presentation. The client may also receive a message from other clients that correspond to the  
15 presentation (see below for further details). A determination is made as to whether the user wishes to comment on the presentation content (decision 365). For example, the user may have a question regarding a particular portion of the presentation.

20 If the user does not wish to comment on the presentation content, decision 365 branches to "No" branch 367 which loops back to receive more presentation content. This looping continues until the user wishes to comment on presentation content, at which point decision 365 branches  
25 to "Yes" branch 369. The user selects an existing rule pen or creates a new rule pen in rule pen stand store 160. The rule pen has an associated rule that includes one or more rule sentences (pre-defined process block 370, see Figure 4 and corresponding text for further details). Rule pen  
30 stand store 160 is the same as that shown in Figure 1. The client's user generates a comment, and the client includes

the comment, along with the selected rule, in a message at step **375**. The client then sends the message to the server at step **380**.

5 A determination is made as to whether the client should continue participating in the distributed presentation (decision **385**). If the client should continue participating, decision **385** branches to "Yes" branch **387** which loops back to participate in the distributed presentation. This looping continues until the client  
10 stops participating in the distributed presentation, at which point decision **385** branches to "No" branch **389** whereupon client processing ends at **390**.

During the distributed presentation, the server makes a determination as to whether it receives a client message  
15 that corresponds to the distributed presentation (decision **320**). If the server does not receive a client message, decision **320** branches to "No" branch **322** which loops back to process the distributed presentation. This looping continues until the server receives a client message, at  
20 which point decision **320** branches to "Yes" branch **324** whereupon the server identifies one or more participants that meet particular rule criteria that is included in the message (pre-defined process block **330**, see **Figure 5** and corresponding text for further details). The server uses a  
25 table located in participant attribute table store **190** during the participant identification process. Participant table attribute store **190** is the same as that shown in **Figure 1** and may be stored on a nonvolatile storage area, such as a computer hard drive.

Once participants have been identified, the message is sent to one or more clients that correspond to the identified participants (step **335**). A determination is made as to whether the server should continue processing the distributed presentation (decision **340**). If the server should continue processing the distributed presentation, decision **340** branches to "Yes" branch **342** which loops back to process the distributed presentation. This looping continues until the server stops processing the distributed presentation, at which point decision **340** branches to "No" branch **348** whereupon server processing ends at **350**.

**Figure 4** is a flowchart showing steps taken in a client selecting a rule pen to include in a message. The client's user, such as user **405**, is involved in a collaborative discussion using the client. The client's user wishes to send a comment to discussion participants that meet certain rule sentence criteria (i.e. a particular skill set or specialty).

Rule pen processing commences at **400**, whereupon the client receives a rule pen request from user **405** at step **410**. A determination is made as to whether the rule pen request corresponds to an existing rule pen (decision **420**). For example, user **405** may have previously created a rule pen that includes one or more rule sentences that correspond to user **405**'s current request. If user **405** wishes to use an existing rule pen, decision **420** branches to "Yes" branch **422** whereupon the client retrieves the rule pen from rule pen stand store **160** (step **430**), and returns at **435**. Rule pen stand store is the same as that shown in **Figure 1**, and may be stored on a nonvolatile storage area, such as a computer hard drive.

On the other hand, if user **405**'s request does not correspond to an existing rule pen, decision **420** branches to "No" branch **428** whereupon the client creates a new rule pen in rule pen stand store **160** at step **440**. The client  
5 receives a first rule sentence from user **405**, and stores the rule sentence in the new rule pen (step **450**). A rule sentence may be atomic or complex, and may include terms, constants, connectives and functions.

A determination is made as to whether user **405** wishes  
10 to append to the new rule (i.e. add more rule sentences) (decision **460**). If user **405** wishes to append to the rule, decision **460** branches to "Yes" branch **462** which loops back to receive a second rule sentence from user **405**, and stores the second rule sentence in the new rule pen. This looping  
15 continues until user **405** does not wish to add more rule sentences to the rule pen, at which point decision **460** branches to "No" branch **468** whereupon processing returns at **470**.

**Figure 5** is a flowchart showing steps taken in a  
20 server identifying one or more participants based upon a rule. The server received a message from a client, such as message **170**, whereby the message includes a comment and a rule. The rule includes one or more rule sentences which the server uses to identify valid participants for which to  
25 forward the message (see **Figure 1** and corresponding text for further details regarding message forwarding). Message **170** is the same as that shown in **Figure 1**.

Server processing commences at **500**, whereupon the server extracts the rule from message **170** at step **510**. The  
30 server selects a first participant entry that is located in

participant attribute store **190** at step **520**. Participant attribute table store is the same as that shown in **Figure 1** and may be stored on a nonvolatile storage area, such as a computer hard drive. A determination is made as to whether the first participant entry matches the extracted rule (decision **530**). For example, if the rule includes three rule sentences, the server determines whether the first participant entry matches each of the three rule sentences. If the first participant entry matches the extracted rule, decision **530** branches to "Yes" branch **538** whereupon the server identifies the participant that corresponds to the first participant entry (step **540**). For example, the server may identify a user id that corresponds to the first participant entry and store the user id in a hash table for use in sending the message to recipient participants. On the other hand, if the first participant entry does not match the extracted rule, decision **530** branches to "No" branch **532** bypassing the participant identification step.

A determination is made as to whether there are more participant entries located in participant attribute table store **190** (decision **550**). If there are more participant entries located in participant attribute table store **190**, decision **550** branches to "Yes" branch **552** which loops back to select (step **560**) and process the next participant entry. This looping continues until there are no more participant entries to process, at which point decision **550** branches to "No" branch **558** whereupon processing returns at **570**.

**Figure 6** is a flowchart showing steps taken in a recipient client receiving and responding to a message. The recipient client is involved in a collaborative

discussion. The recipient client's user was identified as meeting rule criteria corresponding to a message that was sent from another participant (see **Figure 5** and corresponding text for further details regarding participant identification steps).

Recipient client processing commences at **600**, whereupon the client receives a message from server **120** at step **610**. The message includes a comment and a rule, the rule including one or more rule sentences. Server **120** is the same as that shown in **Figure 1**. The client extracts the comment from the message at step **620**, and a determination is made as to whether to display the comment (decision **630**). For example, a participant may configure his client to not display comments that correspond to a particular rule. If the client should not display the comment, decision **630** branches to "No" branch **632** which loops back to receive more messages. This looping continues until the client receives a message that it should display, at which point decision **630** branches to "Yes" branch **638**.

The client displays the comment on display **645** for its user to view. The client may display the comment in the same display window as the one that displays the collaborative discussion. In addition, a participant may configure his screen to display comments based upon a subset of rule pens. For example, his screen may display comments in green that correspond to one rule pen, and may display comments in blue that correspond to another rule pen. A determination is made as to whether the client's user wishes to respond to the comment (decision **650**). For example, the comment may be a question in which the



client's user knows the answer. In this example, the client's user may wish to respond to the inquiring participant. If the client's user does not wish to respond to the comment, decision **650** branches to "No" branch **652**  
5 which loops back to receive more messages. This looping continues until the client's user wishes to respond to a comment, at which point decision **650** branches to "Yes" branch **658**.

A determination is made as to whether the client's  
10 user wishes to export the rule (decision **660**). The client's user may wish to export the rule (and the user-id of the message initiator) in order to generate a new rule pen and associate the rule to the new rule pen. In addition, the client's user may wish to relax or refine the  
15 rule by removing or adding rule sentences. If the user does not wish to export the rule, decision **660** branches to "No" branch **664** bypassing rule exporting steps. On the other hand, if the client's user wishes to export the rule, decision **660** branches to "Yes" branch **662** whereupon the  
20 client exports the rule and associates the rule with a rule pen that is located in rule pen stand store **160** (step **665**). Rule pen stand store **160** is the same as that shown in **Figure 1** and may be stored on a nonvolatile storage area, such as a computer hard drive.

25 A determination is made as to whether the client's user wishes to modify the rule by adding or removing rule sentences (decision **670**). If the client's user does not wish to modify the rule, decision **670** branches to "No" branch **672** bypassing rule modification steps. On the other  
30 hand, if the client's user wishes to modify the rule, decision **670** branches to "Yes" branch **674** whereupon the

client receives input from the user, creates a new rule pen, and associates the modified rule to the new rule pen (step 675).

5 The client generates a reply and sends the reply to server 120 at step 680 using the original rule pen. The reply includes the original rule, as well as a response from the client's user, such as an answer to a question. Client processing ends at 690.

Figure 7 illustrates information handling system 701 which is a simplified example of a computer system capable of performing the computing operations described herein. Computer system 701 includes processor 700 which is coupled to host bus 702. A level two (L2) cache memory 704 is also coupled to host bus 702. Host-to-PCI bridge 706 is coupled to main memory 708, includes cache memory and main memory control functions, and provides bus control to handle transfers among PCI bus 710, processor 700, L2 cache 704, main memory 708, and host bus 702. Main memory 708 is coupled to Host-to-PCI bridge 706 as well as host bus 702. Devices used solely by host processor(s) 700, such as LAN card 730, are coupled to PCI bus 710. Service Processor Interface and ISA Access Pass-through 712 provides an interface between PCI bus 710 and PCI bus 714. In this manner, PCI bus 714 is insulated from PCI bus 710. Devices, such as flash memory 718, are coupled to PCI bus 714. In one implementation, flash memory 718 includes BIOS code that incorporates the necessary processor executable code for a variety of low-level system functions and system boot functions.

30 PCI bus 714 provides an interface for a variety of devices that are shared by host processor(s) 700 and

Service Processor **716** including, for example, flash memory **718**. PCI-to-ISA bridge **735** provides bus control to handle transfers between PCI bus **714** and ISA bus **740**, universal serial bus (USB) functionality **745**, power management  
5 functionality **755**, and can include other functional elements not shown, such as a real-time clock (RTC), DMA control, interrupt support, and system management bus support. Nonvolatile RAM **720** is attached to ISA Bus **740**. Service Processor **716** includes JTAG and I2C busses **722** for  
10 communication with processor(s) **700** during initialization steps. JTAG/I2C busses **722** are also coupled to L2 cache **704**, Host-to-PCI bridge **706**, and main memory **708** providing a communications path between the processor, the Service Processor, the L2 cache, the Host-to-PCI bridge, and the  
15 main memory. Service Processor **716** also has access to system power resources for powering down information handling device **701**.

Peripheral devices and input/output (I/O) devices can be attached to various interfaces (e.g., parallel interface  
20 **762**, serial interface **764**, keyboard interface **768**, and mouse interface **770** coupled to ISA bus **740**. Alternatively, many I/O devices can be accommodated by a super I/O controller (not shown) attached to ISA bus **740**.

In order to attach computer system **701** to another  
25 computer system to copy files over a network, LAN card **730** is coupled to PCI bus **710**. Similarly, to connect computer system **701** to an ISP to connect to the Internet using a telephone line connection, modem **775** is connected to serial port **764** and PCI-to-ISA Bridge **735**.

While the computer system described in **Figure 7** is capable of executing the processes described herein, this computer system is simply one example of a computer system. Those skilled in the art will appreciate that many other  
5 computer system designs are capable of performing the processes described herein.

One of the preferred implementations of the invention is an application, namely, a set of instructions (program code) in a code module which may, for example, be resident  
10 in the random access memory of the computer. Until required by the computer, the set of instructions may be stored in another computer memory, for example, on a hard disk drive, or in removable storage such as an optical disk (for eventual use in a CD ROM) or floppy disk (for eventual  
15 use in a floppy disk drive), or downloaded via the Internet or other computer network. Thus, the present invention may be implemented as a computer program product for use in a computer. In addition, although the various methods described are conveniently implemented in a general purpose  
20 computer selectively activated or reconfigured by software, one of ordinary skill in the art would also recognize that such methods may be carried out in hardware, in firmware, or in more specialized apparatus constructed to perform the required method steps.

25 While particular embodiments of the present invention have been shown and described, it will be obvious to those skilled in the art that, based upon the teachings herein, changes and modifications may be made without departing from this invention and its broader aspects and, therefore,  
30 the appended claims are to encompass within their scope all

such changes and modifications as are within the true spirit and scope of this invention. Furthermore, it is to be understood that the invention is solely defined by the appended claims. It will be understood by those with skill  
5 in the art that if a specific number of an introduced claim element is intended, such intent will be explicitly recited in the claim, and in the absence of such recitation no such limitation is present. For a non-limiting example, as an aid to understanding, the following appended claims contain  
10 usage of the introductory phrases "at least one" and "one or more" to introduce claim elements. However, the use of such phrases should not be construed to imply that the introduction of a claim element by the indefinite articles "a" or "an" limits any particular claim containing such  
15 introduced claim element to inventions containing only one such element, even when the same claim includes the introductory phrases "one or more" or "at least one" and indefinite articles such as "a" or "an"; the same holds true for the use in the claims of definite articles.